

# Conducting Effective Performance Reviews

This three-day workshop will help you teach participants:

- The importance of having a performance review process
- How to work with employees to set performance standards and goals
- Skills in giving feedback, listening, and asking questions
- A proven interview process
- How to make the performance review legally defensible

## **Introduction and Course Overview**

You will spend the first part of the day getting to know participants and discussing what will take place during the workshop. Students will also have an opportunity to identify their personal learning objectives.

## **Basics of Performance Appraisals**

This session will begin with a lecture on the history performance appraisals. Then, participants will move into small groups to discuss of the value of appraisals.

## **Employees' Concerns about PAs**

We will explore some concerns about appraisals and possible responses in a lecture.

## **What Makes PAs a Defensible Process?**

This session will discuss some things that participants can do to ensure that their performance appraisal process is defensible.

## **Stereotypes**

There are four ways that a person can stereotype without necessarily being aware of it. Participants will also explore their own stereotypes in an individual exercise.

## **The Performance Management Process**

To begin, participants will look at the four-stage performance management process through a lecture. Then, participants will work in small groups to review some sample appraisal forms.

## **SMART Goals**

During this session, we will learn about the SMART acronym for goals and re-write some goals to meet these criteria.

## **Goal Setting**

We will continue our work with goal setting by looking at some other considerations and completing a short individual exercise.

**The Performance Management Cycle**

This session will explore the first two stages of the performance management cycle: the basis for review and the performance standard. BARs and KRAs will also be discussed briefly.

**Setting Standards**

We will demonstrate the importance of standards through a short exercise, and then we will discuss the exercise and some general points.

**Performance Development Plan**

The fourth element in the performance management cycle is a performance development plan. We will briefly discuss the components of this type of plan during this session.

**Feedback and Communication**

The need for basic communication skills and proper feedback will be demonstrated through an individual exercise. Then, we will discuss some communication tips.

**Listening and Asking Questions**

We will explore these two key communication skills through a combination of lectures, individual exercises, and small group work.

**Feedback**

Feedback is another critical element of the performance management process. After a brief discussion on feedback, participants will work through several case studies to further explore feedback principles.

**Characteristics of Effective Feedback**

There are six characteristics of effective feedback. During this session, we will examine each characteristic through a lecture and case studies.

**Accepting Criticism**

Accepting criticism from others can be very difficult. We will offer participants some ways to make accepting criticism a little easier.

**Planning the Interview**

This session will look closely at some things you should do before delivering the performance appraisal.

**The Interview**

During this session, we will examine a basic interview format. We will then practice the format through a role play.

**Day Three Overview**

The morning of Day Three will be spent role-playing each stage of the performance appraisal process. Each role play will be followed by discussion and feedback from the trainer and from other participants.

**Maintaining Performance**

Once an employee has achieved a particular level of performance, we usually want them to maintain that level. This session will explore some ways of doing that.

**Behavior Contracts**

This session will examine behavior contracts, a tool that can be used to help an employee achieve a goal or a level of performance. We will also look at rewards that can be used.

**Handling Performance Problems**

During this session, we will discuss what to do if an employee is not achieving a particular level of performance.

**The Worst Case Scenario**

The worst case scenario for many employers is having to fire an employee. We will look at how to handle this situation in a lecture. Then, participants will practice their skills in a role-play.

**Pre-Assignment Review**

To sum up the past three days, participants will look at their pre-assignment, identify areas of improvement, and develop an action plan.

**Performance Management Checklists**

To conclude the workshop, we will review some checklists that you can use during the performance management process.

**Workshop Wrap-Up**

At the end of the day, students will have an opportunity to ask questions and talk with the trainer.